GEO
Guyana Economic Opportunities

A Study and Proposal for the Development of Selected Micro and Small Enterprise Subsectors in Guyana

Prepared by:
Tim Canedo

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Acronyms

APA	Amerindian Peoples Association
BCCDA	Berbice Chamber of Commerce and Development Association
CAGI	Consultative Association of Guyanese Industry
CARICOM	Caribbean Community and Common Market
CARDI	Caribbean Agricultural Research and Development Institute
CESO	Canadian Executive Service Organization
CHC	Canadian High Commission
CI	Conservation International
CIDA	Canadian International Development Association
DFID	Department for International Development
EU	European Union
GEO	Guyana Economic Opportunities Project
GEPC	Guyana Export Promotion Council
GFPA	Guyana Forest Products Association
GMA	Guyana Manufacturers' Association
GOG	Government of Guyana
GO-INVEST	Guyana Office for Investment
GSBA	Guyana Small Business Association
GWHA	Guyana Women's Handicraft Association
GVC	Guyana Volunteer Consultants
HIDA	Handicraft Industry Development Association
IDB	Inter-American Development Bank
IICA	Inter-American Institute for Cooperation on Agriculture
IPED	Institute of Private Enterprise Development
MSE	Micro/Small Enterprise
MOA	Ministry of Agriculture
NGMC	New Guyana Marketing Corporation
NGO	Non-Governmental Organization
PSC	Private Sector Commission
RDC	Rural Development Committee
SS	Subsector
USAID	United States Agency for International Development

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Executive Summary

This report present the activities related to a GEO micro/small enterprise consultancy that took place from the November 6 through the December 22, 1999. The terms of reference for this consultancy can be found in Appendix 1.

The purpose of this consultancy was to undertake an assessment of micro/small enterprises (MSEs) in Guyana with focus on three subsectors, handicrafts, furniture and wood products, and agro-processing. From this assessment, recommendations are made regarding the most appropriate interventions that the GEO could carryout in support of the chosen subsectors.

The Subsector Approach:

The work was carried out using a subsector approach. The subsector approach looks at MSEs as part of a larger system that includes input suppliers, producers using different technologies, wholesale and retail distributors, transportation and finance companies, exporters, etc. There are many commercial relationships that take place among these actors in the process that takes raw materials through production transformation to the ultimate consumer. The subsector approach takes account of these relationships and helps identify constraints and opportunities that lead to the development of cost effective, high impact, and sustainable interventions. The approach is normally accomplished in four phases, 1) subsector selection, 2) subsector analysis, 3) intervention design, and 4) implementation. In general, this was done through a review of documents from a variety of sources, fieldwork and workshops of subsector representatives, and meetings with key informants. The purpose was to identify constraints and opportunities in the subsectors related to seven categories: market access, technology, inputs, policy, finance, organization/management, and infrastructure. The information was entered on constraints and opportunities matrices, which can be found in Appendix 1. Related intervention designs were developed from a clear understanding of the constraints and opportunities for each subsector.

The Assessment of Guyana's MSE Subsectors:

The six week study began in a broad stage of analysis looking at the activities of the identified subsectors (as stated above) on a nationwide scale. It soon became clear that the assessment would need to be more specifically targeted for greater manageability. To do this, a decision was made to concentrate on 5 main areas. They are:

Georgetown/Nationwide
The Rupununi
Linden
Berbice/Upper Corentyne
Essequibo/Pomeroon

These areas were broadly assessed by looking at the wide range of activities related to the identified subsectors. Information gathering then became more specific, relating to both subsector and geography. Section IV of this document will provide greater detail of the findings related to the subsectors in the various geographical areas. By the end of the consultancy the following subsectors, by region, were determined to be good candidates for GEO (and partners) support:

The Rupununi:

1. Balata Crafts
2. Leather products
3. Peanut farming and processing
4. Support to the newly organized Rupununi Chamber of Commerce

Berbice/Upper Corentyne

1. Agro-processing
2. Leather products

Essequibo/Pomeroon

1. Nibbi furniture
2. Agro-processing

Linden

1. Business Awareness/Business Ideas Workshops

Nationwide

1.Coconut Palm oil and by products
2. Policy for MSE development

The Role of the GEO:

The GEO could play a major role in facilitating the development of the subsectors by providing technical assistance, training, and coordination related to the following basic areas:

1. Serve as a coordinator between the target groups of MSEs and producer association/NGOs, ensuring that both are included in development activities.
2. Provide direct assistance (through association/NGOs) to MSEs to compliment and build upon technical support provided by existing development programs.
3. Serve as a facilitator of market linkages between MSEs (through associations/NGOs) and buyers of their products.
4. Serve as a linkage between MSEs and existing financial institutions.
5. Serve to facilitate economies of scale among target groups for buying and selling activities.
6. Identify other promising subsectors as the constraints in the initially chosen subsectors are ameliorated.

The proposed assortment of interventions is unique in that they:

- seek to assist the subsector in the complete chain from raw materials through production to marketing of finished products

- are designed so that GEO will have active partnerships with producers and their associations/NGOs, and will base interventions on their specific product development needs
- focus on intermediaries as the vehicle for improving sales and earnings of MSE producers.

The technical assistance to MSE producers includes support for product design and production, ensuring that orders are produced in a timely manner, helping source cost effective raw materials, production credit, grouping producers to fulfill large orders, proper order fulfillment, providing cost and price estimates, quality control, safe and attractive packaging, shipping and customs procedures, and ongoing communication and customer service. For development of the raw materials base, the same principles will be utilized focusing on upgrading of planting, harvesting, treating and distribution techniques. By providing these services producers will overcome many constraining factors, thereby reducing buyer risk and encouraging more vibrant sales.

The Next Steps:

The GEO is, understandably, not in a position to undertake all proposed interventions. Therefore, the next step will be to prioritize the products/subsectors and select those with which the project will work. Recommendations of this consultant are, in order of priority:

1. Balata crafts
2. Agro-processing - Essequibo and Berbice/Upper Corentyne
3. Leather products – Rupununi and Berbice/Upper Corentyne
4. (Support to Rupununi Chamber of Commerce)
5. Business Awareness/Business Ideas
6. Policy Interventions
7. Nibbi Furniture
8. Palm Products
9. Peanut farming/processing

These can be further narrowed down to 4 major support initiatives:

1. Balata crafts
2. Agro-processing - Essequibo and Berbice/Upper Corentyne
3. Leather products – Rupununi and Berbice/Upper Corentyne
4. Nibbi Furniture

Other interventions are viewed as secondary and will be undertaken as time and resources permit.

The following action points will need to be carried out after targeted subsectors interventions have been determined or selected:

- Continue with further intervention specific research (e.g. information related to exporters, market intermediaries, etc.)
- Assess competitiveness and marketability of products
- Continue contact with potential partners
- Develop memoranda of understanding with partners
- Develop specific strategic plans and time frames for intervention activities

- Develop training plans and TORs for consultancies
- Collect baseline information to be used in comparing information derived from monitoring and evaluation activities
- Implement coordination, technical assistance and training according to plans
- Monitor and evaluate impact and effectiveness of interventions
- Refine interventions based on M&E and other information

Guyana is rich in resources and has a solid skill base of MSE producers for a variety of subsectors. Unfortunately, as with many countries, Guyana lacks any concerted direction for MSE. There are many who are in a position to provide support, but they are not coordinating their efforts or sharing their resources. It is clear that the GEO has an excellent opportunity to provide important coordinating and technical assistance that can have long-term positive effects on the development of MSEs.

I. Introduction

The development of MSEs can play a major part in alleviating poverty, strengthening the macro economy, and assisting in democratization. MSEs generally employ more people than larger firms, supply local markets, utilize local raw materials and expertise, can readily change to meet market needs, are more innovative, and act as a training ground for new entrepreneurs and for the establishment of larger firms.

Over the past thirty years, donors have been refining ideas related to the most effective ways to assist in the development of MSEs. In the early years financial input was viewed as the panacea of MSE development. When financial support alone proved unsuccessful, technical and entrepreneurship training became the new hallmark of MSE development assistance. Later attempts included fragmented support for group production (clustering), market linkages, business planning, etc. In recent years donors have become more concerned with accountability and tracking performance of enterprise development programs. This has led to more direct consideration of sustainability, impact, and cost effectiveness of MSE development programs.

One methodology that attempts to view all the needs of the MSE while also targeting sustainability, impact, and cost effectiveness is the subsector approach to business development services (BDS). The approach looks at MSEs as part of a large system that includes input suppliers, producers using different technologies, wholesale and retail distributors, transportation and finance companies, exporters, etc. There are many commercial relationships that take place among these actors in the process that takes raw materials through production transformation to the ultimate consumer. The subsector approach takes account of these relationships and helps identify constraints and opportunities that lead to the development of cost effective, high impact, and sustainable interventions. The process is accomplished in four phases, 1) subsector selection, 2) subsector analysis, 3) intervention design, and 4) implementation.

Subsector Selection

- Determine criteria for subsector selection
- Identify subsector candidates
- Establish a ranking system
- Initial information collection
- Ranking and selection of subsector to be studied
- Develop initial subsector map

Subsector Analysis

- Conduct in-depth or rapid analysis/survey
- Conduct key informant interviews
- Develop a constraints and opportunities/intervention matrix
- Refine subsector map
- Workshop with subsector representatives to validate findings

Intervention Design

- Workshop with subsector representatives to identify potential interventions
- Refine map and constraints and opportunities/intervention matrix

- Identify most promising interventions through a ranking process
- Gather intervention specific information
- Secure commitments from others who will be partnering in the intervention(s)
- Develop concept papers for selected interventions

Implementation

- Refine concept papers
- Develop work-plans
- Assignment of tasks for all parties involved
- Develop monitoring/evaluation system

II. Overview of and Support to MSE sectors in Guyana

A. General Overview

There is a good deal of activity that can be characterized as MSE in Guyana. Guyana is unique in that there are few large enterprises and the medium, small and micro level enterprises are smaller than what may be considered the norm in other countries. The Guyana Small Business Association has provided the following regional (CARICOM) definitions for micro, small and medium enterprises:

	Micro	**Small**	**Medium**
Number of Employees	1 – 5	6 – 25	26 – 50
Investment of equipment and machinery	< US $15,000	US $15,001 – US $50,000	US $50,001 – US $250,000
Credit Needs	< US $5000	> US $5000	None
Sales	< US $15,000	US $15,001 – US $125,000	US $125,001 – US $1 million

One other consideration when defining business relates to the time spent with the activity. For example, if a person spends a few hours a week producing handicrafts this may be viewed as an "income generating" project or a cottage activity, but not a "business".

B. Major MSE Subsectors in Guyana

MSEs in Guyana are numerous and spread randomly throughout the country. The following presents a list of what are believed to be the main subsectors in which the MSEs in Guyana are working:

Leather

- Tanning
- Production
  - Belts
  - Bags
  - Wallets
  - Saddles and reins

Agriculture

- Rice and sugar (the two main agricultural crops)

- Large variety of fruits/nuts and vegetables for sales in a fresh state, to include:

Bananas	Yams
Plantains	Peppers
Cassava	Carambola
Peanuts	Guava
Cashews	Papaya
W. Indian Cherries	Citrus
Passion Fruit	Lettuce
Pineapples	Tomatoes

- Palm Products

    Hearts of Palm
    Coconuts
        Oil
        Copra
        Fiber
        Coconut water
        Coconut Juice (milk and jelly)

Agro-processing

- The use of the above mentioned agricultural products transformed to:

    Juices
    Chunks and pulps
    Jams and jellies
    Pickles and atchars
    Sauces

Wood Products

- Timber
- Milling/planing of lumber
- Furniture
- Sculptures
- Frames, doors, casings, etc.

Nibbi/cane furniture

- Indoor and outdoor furniture

Mining/Jewelry

- Mining of gold, diamonds and a variety of precious and semi-precious stones

- Manufacturing of jewelry

Aquaculture

- A variety of fish and crustaceans from the sea, rivers and man-made ponds

Garments

- A variety of textile products

Eco-tourism

- Transport
- Guides for nature walks, mountain climbing, river trips, etc.
- Conservation efforts
- Food services

Other Handicrafts

- Hammocks
- Knitting
- Cross-stitching
- Baskets
- Paintings
- Balata crafts

C. General Constraints to MSE Growth in Guyana

There appear to be some basic "across the board" constraints facing the MSEs in Guyana. The following present these constraints by seven categories:

Markets:
The main issue is the lack of information about markets (both product and input) and the lack of coordination in reaching them.

Technology:
Quality control is a major constraint especially related to the "finishing" tasks associated with production. Also needed are upgrading of technological skills.

Raw Materials:

Availability and quality of raw materials are problems faced by many MSE subsectors. Again, there is a lack of coordination regarding the provision of raw materials.

Policy:
There does not appear to be government policy that is targeted to MSEs to enable them to grow as a sector of the economy.

Management/Organization:
Management at the individual firm level is weak. Perhaps more importantly, producer groups are also very weak.

Finance:
Many MSEs complain about their inability to access credit due to insufficient collateral, no financial institutions with schemes for MSEs, and high interest rates. Equally important appears to be the lack of knowledge of costing, pricing, and financial planning.

Infrastructure:
Although constraints in this category are not ones that a program like the GEO could help to ameliorate, they remain an important part of the total picture. These include non-existent or poorly maintained roads, lack of power (or power outages), irrigation needs, communication problems, etc.

D. General Opportunities for Growth of the MSEs in Guyana

Markets:
Although MSEs are having difficulty accessing markets, there does seem to be some real potential for local and export marketing. Opportunities for local markets can be enhanced by competing with the numerous products imported from N. America, Europe and even Asia.

Regarding exports markets, opportunities exist through CARICOM, CARIBCAN, the Caribbean Basin Initiative, the General System of Preference (GSP), ACP-EU Lomé Convention as well as regional markets in Columbia, Venezuela and Brazil.

Technology:
For most of the MSE activity witnessed, there appears to be a sound foundation of technical skills at the producer level. Additionally, there are institutions throughout the country that have experts in many fields related to the activities of the MSEs.

Raw Materials:
Guyana abounds with raw materials such as timber, minerals, many types of agriculture, livestock, fish, etc. This raw material base seems abundant, but proper conservation efforts must be considered and implemented.

Policy:
There are many dealing with MSEs who see the need for more specific policy, with the right coordination they could identify, lobby for, and gain the needed policy.

Management/Organization:
At the institutional level, there exist formal associations and informal groups that relate to various subsectors. These are excellent candidates for development as coordinating bodies for MSE producer groups. The groups could benefit from bulk buying of raw materials, sharing of technology and equipment, and tapping into larger markets.

Finance:
The main financial player for MSEs is IPED. It appears to be doing a good job and is reaching many, but could probably further develop the financial services to reach more MSE individuals and groups.

Infrastructure:
Although lack of infrastructure is a major constraint, there does appear to be progress. Examples of this are the provision of electricity to the Lethem area, plans for the upgrading of the road from Georgetown to the Rupununi, greater availability of telephone service, etc.

E. Summary of Support to MSEs in Guyana

Like most countries Guyana has a host of institutions that could provide support to MSEs. But also like most countries, these institutions are in varying states of readiness to address the specific needs of the MSEs. In fact, many need development themselves, and all could benefit from inter-institution communication and coordination. The fact remains, though, that within these institutions are some very knowledgeable experts in fields such as agriculture, business, and technology. One important aspect of proposed interventions by the GEO includes the partnering with local and international organizations/institutions to provide for a wider resource base to be tapped in assisting the MSE with a total package of business development services.

The following shows the institutions that were identified during this consultancy and the services that they offer (the services were not always clear and may not be100% accurate as presented):

	Public/ Private	**Provide Funds**	**Provide Technical Training**	**Provide Management Training**	**Provide Marketing Assistance**	**Provide Extension. Services**	**Policy**
Trng/Res. Institutions							
Georgetown Training Inst.	Public		X	X		X	
Linden Training Inst.	Public		X	X		X	
NAIT	Public		X			X	
Guyana Industrial Training Ctr.	Public		X	X			
CARDI	Public		X			X	
Chambers of Commerce							
Georgetown	Private						X
Linden	Private						X
Berbice	Private						X
Essequibo	Private						X
Rupununi	Private						X
Financial Institutions							
IPED	Private	X	YES - starting	X			
SCOTIA	Private	X					
Small Bus. Credit Init.	Private						
NGOs/Assns.							
CESO/GVC	Private		X	X		X	X
Red Thread	Private		X	X	X		X
The Beacon Foundation	Private						
Small Business Association	Private		Occasionally	Occasionally			X
The NGO Forum	Private						X
St. Francis Xavier Youth Club	Private		X	X	X	X	X
Marketing							
Guyana Marketing Corporation	Public				X		X
Go-Invest/Export Promotion Council	Public				X		X
Int'l. Orgs.							
IDB		X	X	X	X		
IICA			X	X	X	X	
CIDA							
Cons.International			X	X	X	X	X
Partners for the Americas			X	X	X	X	

III. The Subsector Approach for the GEO Project

The selection of subsectors and subsequent analysis and intervention planning were accomplished by focusing on specific geographical areas. The targeted areas are:

Linden
Essequibo
Berbice
The Rupununi
Nationwide/Georgetown

These areas were chosen based on the fact that the GEO plans to work with micro-credit in the Rupununi, the other three regions are major population centers, and all areas have Chambers of Commerce that can be used as a resource by GEO. In addition:

- The Rupununi and Essequibo are areas of strong focus for development by the government.
- Linden is a highly developed area (infrastructure), and has high unemployment due to the decline in bauxite mining
- Berbice is facing general economic decline, and has a high level of MSE economic activity (albeit mainly in agriculture)

Note that the choice of these five (5) areas for the initial focus does not in any way mean that GEO will not or could not become involved in other geographic areas, as for instance the Northwest. It was simply decided that the first analysis should target these areas which offer perhaps more potential due to higher population density, market access, existing infrastructure, etc. It is strongly possible that initial successes with interventions in one or several of the above five geographic areas could later be replicated and extended nationally.

A. Subsector Selection

The process of selecting the subsector(s) to analyze was undertaken in the following steps:

1. Determine criteria
2. Identify candidates
3. Establish a ranking system
4. Collect information
5. Select subsectors

The following table explains the selection criteria that were used in determining the subsectors to target at each geographical level (to be presented in the next section).

Criteria	Explanation
Unmet Market demand	Strong effective demand stemming from local demand, government, public works, export opportunities, etc.
Export potential	Due to the small size of the local market, it is necessary to develop MSEs that may have potential to reach regional markets and possibly markets further afield.
Potential for employment creation	Potential for enterprises (large and small) in the subsector to create new employment opportunities.
Value added/use of domestic inputs	Opportunities to add value to raw materials, leading to higher earnings.
MSE highly represented	The chosen subsector should have a large representation of MSEs.
Potential to reach more women	Opportunities to reach traditionally underrepresented segments of society and enable them to enter into the market economy.
Potential to reach Amerindians	Same as above.
Linkage opportunities	Potential for forward and backward linkages between large and small enterprise. Number of MSEs able to engage in linkages.
Partnering (w/other orgs) opportunities	Government or donor interest in a subsector (can translate into positive linkages, overall support, and/or funding). Existing programs in the same subsector can result in synergies and complementary activities.
Available Technology	Consideration for technologies at hand that would not require large leaps of upgrading.

Assessments of the short-listed subsectors according to the above criteria are provided in Appendix 1.

B. Identification of Constraints and Opportunities of Chosen Subsectors

Identifying Constraints and Opportunities

The constraints and opportunities are listed by categories in order to facilitate information gathering as well as intervention design. The categories are the same seven used earlier when discussing general constraints and opportunities for MSEs in Guyana. These seven categories should cover all possible constraints and opportunities of the subsector. They are:

1. Technological /Product Development Constraints

2. Market Access Constraints
3. Organization and Management Constraints
4. Policy (regulatory) Constraints
5. Financial Constraints
6. Input and Supply (Procurement) Constraints
7. Infrastructure Constraints

C. General Analyses of Chosen Subsectors

The analysis of a subsector is usually based on information from three sources: 1) information gathering through key informant interviews, 2) survey of MSEs, and 3) validation workshop of subsector representatives.

For these analyses, time did not permit the undertaking of surveys. Therefore, the analyses were based on key informant interviews and validation workshops.

***Key Informant Interviews*:**

These interviews took place in the four targeted areas as well as Georgetown. Interviewed were a variety of persons with different experiences and interest in MSEs (see appendix #3). These included:

Producers
Distributors
Marketers
Exporters
Government Officials
Officials from Chambers of Commerce
Academics
NGO personnel

A wealth of information was gathered providing a wide range of relevant information pertaining to the constraints and opportunities of MSEs in general as well as MSEs of specific subsectors.

Workshop with Subsector Representatives

A workshop with subsector representatives was designed to review the subsector information gathered and propose interventions to address constraints and opportunities. Formal workshops were held in Linden, Berbice, and Essequibo. Smaller meetings were held in Lethem (Rupununi). The purpose of the workshops was to:

- validate findings and information gathered related to constraints and opportunities for specific subsectors and,
- encourage participants to propose interventions to overcome constraints and take advantage of opportunities

IV. Targeted Subsectors by Geographic Area

As mentioned previously, the focus of the subsector work was in four areas of the country. The following presents the subsectors considered for each area. There were also some nationwide considerations, which are presented after the four areas.

Rupununi

Interviews with key informants included the following:

Members of the Rupununi Chamber of Commerce
Members of Livestock Association
Group of Peanut Farmers
Members of the Rupununi Weaver's Society
Balata Craftspersons at Nappi Village
Leather Tanner/Producers
Various entrepreneurs
Director of Beacon Foundation

***The subsectors considered*:**

Initially there were six subsectors considered for the Rupununi:

Cashews	Peanuts	Livestock	Balata crafts	Leather	Weaving

Through an analysis of the criteria discussed earlier and presented in Appendix 1, it was determined that cashews, peanuts, leather products, and Balata crafts offered the highest potential for growth and development. IICA is already planning a pilot project for cashews in the Rupununi. The pilot project might later indicate a need for assistance from GEO. Both livestock and weaving face major marketing problems (livestock due to low level of slaughtering due to lack of foot and mouth certification, and weaving of hammocks due to the high pricing that makes it unaffordable for all but the wealthy).

This left peanuts, leather and Balata as the best choices. Further information gathering and discussions led to the conclusion that more information was needed before developing interventions for the peanut growing/processing subsector. The final choice of subsectors for the Rupununi ended up being leather products and Balata crafts. These are further detailed below.

1 – Balata crafts

These are a variety of craft items that are made from the latex sap of the bulletwood tree. The trees are tapped by the Macushi Indians of the Rupununi (Region 9). Although Balata is collected in other parts of Guyana, for the purposes of this report we will concentrate on the collection and production in the Rupununi Region, more specifically Nappi Village. Crafts are made by village members and represent the indigenous animals, country scenes, and scenes of village life. Craftspersons are willing to make almost any design requested.

Although there are no statistics on the number of persons involved within this subsector, it is estimated that there are about 30 Amerindian producers in Nappi village. Additionally, there are other Amerindian villages where people are undertaking this activity. Also, there are those that collect the raw Balata latex. It is reported that there are others, in Nappi and other villages, who are interested in learning the craft.

Identified constraints and opportunities:
The following are the major constraints and opportunities identified during the analysis of the Balata crafts subsector. These will be the basis for recommended interventions.

Category	Constraints	Opportunities
Market Access	Lack of access to a larger market that can provide for larger volume production. Lack of integrated coordinated marketing effort. Lack of understanding of the market at the local level.	Conservation International has worked with this group and feels that there is a foreign market.
Technology	Lack of "finishing" skills by many craftspersons. Lack of designs that may be more marketable. Lack of methodology for handling hot Balata before forming the craft articles.	High level of skill available from Master Balata craftsman in Nappi.
Policy	No Policy.	Interest by village leaders.
Inputs	Lack of coordination by collectors of Balata. Lack of knowledge of environmental issues, e.g rotation of trees to be tapped.	There appears to be a good supply of bulletwood trees that are tapped for Balata.
Finance	Lack of capital to purchase raw materials in large quantities.	
Organization / Management	Balata crafts association lacks organization and management skills. There appears to be a group dynamics issue that needs to be resolved.	There is an association in place, but needs support.
Infrastructure	Transport can be a problem during rainy season.	

Subsector 2 - Leather products

There are a variety of leather products produced including belts, ladies bags, passport holders, portfolios, and other items for personal use. In addition, farm related products are also produced including saddles, reins, riding crops, etc. Interventions for this subsector would include developing relationships with the leather producers of Berbice.

Although exact numbers are not known, it is reported that there are 25 to 30 leather craftsmen in the Lethem area (some at the Master level), but only a handful are actively involved in production. There are others who are undertaking tanning activities. With greater coordinated marketing efforts, numbers of tanners and producers would certainly increase.

Identified constraints and opportunities:

The following are the major constraints and opportunities identified during the analysis of the leather products subsector.

Category	Constraints	Opportunities
Market Access	Lack of coordinated marketing effort. Lack of knowledge of marketing practices. Lack of linkages with intermediaries for coastal and export markets. Lack of ability to produce in large volume.	Have had Georgetown markets in the past – these lapsed due to producers non supply.
Technology	Not all producers have the required hand tools to undertake wide range production. Quality control irregularities.	Tanning is "organically" done using the bark from the mari mari tree. Technical expertise is available in Lethem.
Policy	No specific policy.	
Inputs	Skins are not always available. Lack of adequate sourcing of accessories (buckles, fasteners, etc.).	With the removal of foot and mouth related restrictions, more hides should become available.
Finance.	Lack of credit arrangement between producers and buyers.	
Organization / Management	Lack of formalized association of leather producers. Producers lack basic business skills.	There exist a group of leather producers in and around Lethem who could be formalized.

Subsector 3 – Peanut production/processing

This subsector was initially considered and still remains high on the list of possibilities but, through discussions, it was decided that more information was needed before furthering the planning for interventions for this Subsector. It is reported that there are thousands of people growing peanuts in the Rupununi, some at the level of garden plots, while others are growing on a larger scale.

Special consideration for Rupununi

A few days prior to this consultant's visit to the Rupununi a new Chamber of Commerce was formed. Many are interested in the development of the new Chamber and the enthusiasm is at a high level. Premises have been located, an administrator has been identified, and everyone is looking forward to the positive activities that can be carried out under the auspices of the Chamber. The challenge is, that the new Chamber is in dire need of assistance in this start-up phase. In conversations with members of the new Chamber it became clear that there are some great intentions, but little understanding of what direction to take. It was stressed that everyone is very excited at this time and that assistance should be provided while this energy level is high. It is therefore proposed that the GEO assist with the following:

- Development of a mission statement, constitution, by-laws, etc.
- Setting up the physical office of the Chamber to include; computer training (word, excel, access, and internet), develop office operating policies and procedures
- Development of short and long range planning
- Training in fundraising/proposal writing

Essequibo

The analysis of the subsectors included a review of documentation, key informant interviews and site visits and a subsector workshop. Interviews with key informants included the following:

Members of the Essequibo Chamber of Commerce
Agro-processing businesses
Nibbi furniture producers
Wood furniture producers
Farmers (fruits and vegetables)
Community development workers
Various entrepreneurs

The subsectors considered:

Essequibo is overwhelmingly a rice growing area. There are other crops grown, but rice dominates. Because of this, there appeared to be fewer MSE activities to assess. The list started with four possibilities, wood furniture, agro-processing, Nibbi furniture, and palm products. Marketing and technology issues precluded further attention to the wood furniture subsector (related to the need for higher quality, which would require major skills upgrading efforts and costly acquisition of sophisticated machinery). This left the Nibbi furniture, agro-processing, and coconut palm oil (and by-products). It was decided that, through collaboration with CESO/GVC, GEO could address the coconut oil palm subsector on a wider multi-regional level to be explained at the end of this section. The final candidates for GEO assistance became the Nibbi furniture and agro-processing and are presented in more detail below.

Subsector 1 – Nibbi furniture

Considered by some to be a handicraft, this product is made from indigenous raw materials. The end products are very similar to cane/rattan furniture. The furniture is made for home, garden and office and is particularly appropriate for warmer climates. Some of this furniture is currently being exported to CARICOM countries where, it is reported, there is a significant market. At the MSE level there are reportedly 30-40 producers in Essequibo while the Pomeroon has, in excess of 200 producers (most of these are Amerindian).

Identified constraints and opportunities:

The following are the major constraints and opportunities identified during the analysis of the Nibbi furniture subsector.

Category	**Constraint**	**Opportunities**
Market Access	Lack of knowledge of markets and marketing practices. Lack of coordination between MSEs and buyers.	
Technology	Lack of updated hand tools.	Expertise available in Anna Regina and Pomeroon.
Policy	Lack of specific policy.	
Inputs	Lack of coordination among raw material collectors. Raw materials not always available. Lack of understanding of environmental issues.	
Finance	Lack capital for purchasing of large amounts of raw materials.	
Organization / Management	Lack of association of producers.	Informal groups of producers exist.

Subsector 2 – Agro-processing

The intervention would be directed to a women's group in Anna Regina. These women are currently independently making hot sauces, pickled vegetables, chutneys, etc. These products are currently sold to local consumers. An effort would be made to link the women's group with another women's agro-processing group in Berbice/Upper Corentyne (described in the following section on Berbice). It is reported that upwards of a hundred people (mainly women) are involved in agro-processing in Essequibo. The subsector also includes many who are growing the agricultural crops used by the agro-processors.

Identified constraints and opportunities:

Category	Constraint	Opportunities
Market Access	Lack of knowledge of markets and marketing techniques. Lack of coordination with large volume buyers/exporters.	There appears to be markets at the local level, city level, export to CARICOM and export to diasporas in US and other countries.
Technology	Lack of understanding of standards for food processing. Lack of canning/bottling technology. Lack of packaging technology.	The women are currently producing very good products from their own recipes.
Policy		
Inputs	Lack of coordinated efforts when buying raw materials Lack of equipment needed for increased production.	Ample supply of fruits and vegetables from the immediate area.
Finance	Capital needed for volume buying of raw materials.	
Organization / Management	Lack of well organized association that could support this intervention. Lack of business management practices by MSEs.	Informal women's group currently exist.

Berbice/Upper Corentyne

The analysis of the subsectors included review of documentation, key informant interviews and site visits and a subsector workshop. Interviews with key informants included the following:

Members of the Berbice Chamber of Commerce
Agro-processing subsector representatives
Leather products producers
Wood furniture producers
Farmers (fruits and vegetables)
Buyer/retailer
Community development workers

Various entrepreneurs

The subsectors considered:

Most economic activities in Berbice are farm related, with a wide variety of fruits and vegetables grown. The list started with five possibilities wood products, leather products, textile/handicrafts, agro-processing, and palm products. Again, marketing and technology issues precluded further attention to the wood furniture subsector due to the high degree of input that would be needed for an unsubstantiated market. This left the leather products, textile handicrafts, agro-processing, and coconut palm oil (and by-products). Regarding the textile handicrafts, the potential market was unclear and would warrant further investigation. It was decided that, through collaboration with CESO/GVC the GEO could address the coconut oil palm subsector on a wider multi-regional level to be explained later. The final candidates for GEO assistance became the leather products and agro-processing. Interventions for both of these subsectors would include the development of relationships with like subsectors in the Rupununi (leather) and Essequibo (agro-processing). The details of the subsectors are as follows:

Subsector 1 – Leather products

Like the leather producers in the Rupununi, the Berbice leather producers are making a wide range of belts, bags, wallets, etc. The Berbice producers are not making the farm products to the level of those in the Rupununi. Again, part of the intervention would include the development of linkages with leather producers in the Rupununi. There are reportedly more than 100 persons who have the skill to produce handmade leather products. The subsector also includes many who are involved in the process of tanning.

Identified constraints and opportunities:

Category	Constraints	Opportunities
Market Access	Lack of coordinated marketing effort. Lack of knowledge of marketing practices. Lack of linkages with intermediaries for coastal and export markets.	Current limited markets in New Amsterdam and Georgetown. Some producers are attempting to locate foreign markets.
Technology	Not all producers have the required hand tools to undertake wide range production.	Tanning is “organically” done using the bark and also done with chemicals There is a good pool of expertise in Berbice.
Policy	No specific policy.	
Inputs	Skins are not always available. Lack of adequate sourcing of accessories (buckles,	With remove of foot and mouth related restrictions, more hides should become

	fasteners, etc.).	available.
Finance	Lack of credit arrangement between producers and buyers.	
Organization / Management	Lack of formalized association of leather producers. Producers lack basic business skills.	There exist a group of leather producers in Berbice who could be formalized.

Subsector 2 – Agro-processing

The intervention would be targeted to a group of women associated with the St. Francis Xavier Youth Club and also to growers of raw materials. The processing group was well represented in the subsector workshop at New Amsterdam. Products include hot sauces, chutneys, atchar, and related products. Part of the intervention would include developing relationships with agro-processors in Essequibo.

There are reportedly hundreds of persons (mainly women) involved in agro-processing.

Identified constraints and opportunities:

Category	Constraints	Opportunities
Market Access	Lack of linkages with markets. Lack of promotion. No information related to markets and marketing techniques.	
Technology	Lack of understanding of quality standards. Lack of knowledge of methodology of preservation for fruits and vegetables. Lack of equipment needed for larger production.	General expertise exist for many products.
Policy	Lack of specific policy.	
Inputs	Raw material prices are erratic. Acceptable quality not always available.	Use of locally grown raw materials.
Finance	Lack of supplier credit. Lack of collateral for loans.	
Organization / Management	Lack of formalized grouping for economies of scale.	There are groups of producers under the umbrella of the St.

		Francis Xavier Youth Club.

Linden

Linden poses a special challenge with regard to the development of MSEs. As a one time “company town”, Linden remains in that mindset. There are few who are engaged in MSEs outside of retail activities. What is needed at this time is more of an introduction to self-employment for the people of Linden. This would be in the form of workshops that would have two main foci, 1) to impart awareness of business to chosen groups, and 2) to assess and develop new business ideas. Because of their history of working in Linden, and their interest in this intervention, the Red Thread organization could partner with the GEO in this endeavor. Section VI, No. 4 provides greater detail of the types of intervention that could be provided to the people of Linden.

Nationwide and General

Policy

It is clear that there is no substantial policy for MSE development in Guyana. One result of the Presidential Business Summit was agreement for the drafting of a Small Business Act. A proposed intervention under GEO would be the development of a local group that could be trained to undertake research and lobbying for issues related to MSE development. This intervention will be furthered detailed in Appendix 4.

Coconut Palm Products

The intervention for assisting this subsector would be in collaboration with CESO/GVC and the Coconut Development Association of Guyana (CDAG). The main efforts would include:

- the provision of technical assistance to farmers
- further development of the CDAG enabling it to provide services to their membership
- develop markets linkages between farmers and local/export buyers
- development of an extension scheme for coconut farmers
- investigate further the uses of and markets for coconut by-products

Linkages with Regional Chambers of Commerce

There are currently four regional chambers of commerce, with a fifth just formed in Lethem. These chambers are composed predominately of small and micro-enterprises. The chambers were instrumental in setting up the subsector workshops for this assignment and have shown interest in assisting with an MSE program. Since GEO is already working to strengthen these chambers, it would appear to be a logical next step to extend this partnership to include MSE training and assistance programs which could be channeled through the chambers.

V. Chosen Subsectors and Proposed Interventions

In the preceding section we have identified those products and subsectors offering the most potential in terms of growth, employment generation, target disadvantaged groups, and export potential. Given limited GEO resources, the list will have to be narrowed, at least initially, in terms of number of groups/products or geographic areas with which the project would work.

This section will focus on those subsectors identified previously and detail the general intervention activities that should be provided for each. The four (4) recommended subsectors are :

1. Balata crafts
2. Agro-processing - Essequibo and Berbice/Upper Corentyne
3. Leather products – Rupununi and Berbice/Upper Corentyne
4. Nibbi Furniture

Secondary interventions could be for:

Linden:	Business Awareness/Business Ideas Workshops
Nationwide:	Coconut Palm – oil and other by products
	Policy for MSEs

The initial next steps for the GEO will be to make a final determination regarding the appropriateness of working with some or all of the proposed four subsectors listed above. GEO will need to immediately undertake two tasks:

1. Determine, in more detail, the marketability (and export potential) of the products related to the chosen subsectors. This will need to be done by a) developing a brief portfolio of products, b) contacting sellers and buyers, and c) determination of the feasibility of production to meet market demand. The production effort must be market driven, that is to say, a result of what buyers demand for their customers.
2. Continue developing working relationships with potential partners for each subsector to develop, through a memorandum of understanding, a well-designed package of intervention activities for each subsector.

A. The basic objectives for all interventions could include the following:

1. To provide technical assistance to MSEs that provide of raw materials, agro-processors, and market intermediaries.

2. To establish and/or strengthen groups (associations/NGOs) enabling them to enhance the subsector through developing and managing raw materials, production and market linkages.

3. To provide technical, managerial and marketing assistance that will result in an increase in sales over the project period.

4. To develop working relationships between the groups of different regions.

5. To explore the development of private sector extension services.

6. To develop increased awareness, and enhanced environmentally friendly practices of raw material collection.

B. In general, interventions would be provided (for all subsectors) at four levels 1) raw material supplies, 2) producer, 3) producer association, and 4) marketing.

Raw Material Supplier Level Assistance

The GEO together with other partners could, at the raw material level, organize raw material producer groups and build the production and management capacity of their members by providing technical training, production planning to fulfill quota requirements, and business practices. Assistance with raw materials from the GEO Team could be in the following areas:

- assisting MSEs in determining exact raw material needs;
- assisting raw materials suppliers in understanding the needs of producers and planning for supplying of needed materials;
- assisting in determining geographical source of best raw materials;
- promoting environmentally friendly practices in the provision of raw materials;
- encouraging raw material suppliers to work together to so as to provide larger quantities of raw materials.

Producer Level Assistance

The GEO Team can provide assistance directly to MSEs to enhance the quality and capacity of production. This could be done directly or through the producer's associations, regional chambers of commerce, or NGOs. Assistance from the GEO Team could be in the following areas:

- assisting existing enterprises or new entrepreneurs to establish new businesses that address particular sector constraints (for example: machine rental businesses for sectors in which small enterprises cannot afford machines for themselves or refrigeration services for perishable products);
- assisting enterprises to branch out into new areas of production or services;
- assisting enterprises to assess the viability of new technologies;
- assisting with alternative sources of financing that might include: supplier credit for raw materials, buyer credit to suppliers, and loans that are guaranteed by associations/NGOs or marketing organizations that buy the MSEs products;
- assisting with business skills development programs that range from financial management, production techniques, organization development, marketing, and customer relations, to the development of business and marketing plans. Beneficiary participation would be built into these programs, although full cost recovery will probably not be feasible when working with the smallest enterprises. Training could be presented through regional chambers, many of whose members themselves are MSEs and could be the target of similar training programs.

- assisting MSEs to purchase in groups (through their association/NGO) to aggregate purchases and/or create new supply sources;
- modifying production processes so that higher and more consistent quality products and services can be produced;
- improving the efficient use of raw materials, labor and time;
- applying the correct mix of raw materials, skills, product designs, tools, equipment and processes to meet higher specifications and access new, higher income markets;
- assisting in addressing technologies that relate to key constraints and opportunities in the subsectors, ensuring that the technology[1]:
    - provides for products that meet a market demand;
    - is affordable to the targeted MSEs (or can be bought by an entrepreneur and rented to targeted MSEs);
    - when possible, is machined and distributed using local skills, materials and markets
    - is able to be operated by target user;
    - is durable & easily repaired using local skills - parts available;
    - represents a scale of production realistic for targeted MSEs and markets;
    - is environmentally sustainable.

Producer Association/NGO Level Assistance

The GEO in partnership with others (the GEO Team) can actively promote Producers Associations (NGOs) activities as a sustainable form of technical and market assistance to MSEs. The GEO team would work with producer associations/NGOS to develop their abilities to coordinate buying from and selling for the MSEs. Assistance from the GEO Team could be in the following areas:

- providing technical assistance in product/service development, new product development, processing, and packaging;
- establishing standards for quality control;
- sourcing and facilitating access to financing from formal financial systems;
- strengthening the producer organizations (for example, assembling member products at central pick-up points);
- assisting the possibilities of franchising services (for work being undertaken by the producer association/NGO) to other private sector individual or groups;
- assisting in establishing intermediary marketing groups that allow the organization to focus more directly on wholesale purchasing;
- improving internal administrative and financial procedures and establishing operating policies and procedures;
- developing marketing and business plans to expand current markets;

[1] The GEO could explore the possibility of introducing private sector agricultural extension service to farmers and agro-processors. This may entail a pilot program whereby GEO can solicit bids from private companies to undertake specific tasks, with a specific group of farmers, for a specific amount of time. Results of this effort would provide, 1) a means of comparison to other extension services, and 2) a means of gauging interest on the part of the farmer and agro-processors, and their willingness to pay for services.

- leadership training for association management;
- developing capacity to intervene on behalf of MSEs with local authorities.

Local and Export Marketing Level Assistance

The GEO team can promote market linkages between large volume buyers and small enterprise suppliers (assisted by their associations/NGOS). Buyers might include private companies, traders, marketing associations, government, and other kinds of marketing organizations. The GEO will ensure that the marketing efforts are demand led and that the producers are providing exactly to the specifications of the market. GEO team support could include the following:

- information collection and dissemination on available suppliers and buyers;
- developing information systems that facilitate searching and matching linkage opportunities;
- use of the internet to promote products;
- linkage workshops that bring together suppliers and buyers in specific sectors;
- buyer and supplier assistance (through associations/NGOs) to negotiate linkage arrangements such as collection of product, shipping and handling, payments, standards;
- opportunities for new products and services.
- assist enterprises and their associations to participate in national and international trade shows and exhibitions for their products and services.

C. Summaries of Subsectors and Statement of Constraints and Opportunities

1. Balata Crafts in the Rupununi

Summary

This summary is the result of analysis and intervention design efforts for the "Balata craft products" subsector in the Rupununi region of Guyana. The analysis of the subsector was undertaken in three parts, as follows:

- A review of the relevant literature from NGOs, Government, donor and academic sources.
- Meeting with those persons who have knowledge of the subsector, in Georgetown and the Rupununi.
- Field investigations at Nappi village (production site).

From the analysis, the consultant determined constraints and opportunities that exist in the subsector, and considered support interventions to address them. If balata crafts are selected, interventions should include the following:

- The GEO together with partners (the GEO Team) will identify producers and provide them with extension support as a group to enhance their production and management abilities.
- The GEO Team will support the development of the balata craft in Nappi in a collaborative effort with Conservational International (CI) and other possible partners in the Rupununi.

This effort will include the general areas of securing raw materials, coordinating production, and marketing.

- The GEO Team will identify market agents who will purchase the products produced by the groups, and assist in developing relationships between buyers and the production groups. Marketing agents are key in providing both forward and backward linkage services.
- The GEO Team will identify and work with the existing Nappi balata craft producers' group to assist them in developing products of sufficient quality and quantity for reaching larger markets. Additionally, new producers will be identified and trained.
- The GEO Team will work to facilitate the process for these producers to access credit from financial institutions for bulk buying of raw materials.
- The GEO Team will also work to develop the raw material collecting activities for the balata crafts with special emphasis on conservation issues.

Statement of Opportunities and Constraints

Balata is a rubber-like substance that is harvested from bulletwood trees in various parts of Guyana. It is especially abundant in the Rupununi region. For many years balata has been collected by the Macushi Indians through the simple process of cutting diagonal channels in the bark of the tree to release the sap. At one point there was a significant demand for the balata on the export market. At that time balata was used in the manufacture of a variety of products including: cable insulation, shoes, golf balls, etc. During this time, artistic figures were also being made from balata. With the discovery of synthetics that were equivalent to balata, the demand for balata diminished. What was at one time a major cash earner for the Macushi people the balata has now reverted back to being used mainly for storage jugs and utensils for personal use. Even the production of the balata crafts was on the wane. Over the past 5-6 years Conservation International (CI) has been working with the Macushi to revive the working of balata as a craft. There is a firm skill base of producers in Nappi village with one "artist" whose skills could qualify him for "master craftsman" status. He has excellent knowledge of raw materials collection, design of crafts, all aspects of production, and is experienced in training others. The items that are being made by the Balata crafts producers include figurines of local animals and scenes of village life. The crafts-persons are quite willing and able to produce any special designs.

The subsector faces constraints in areas related to marketing, technology, finance, and management and organization. Marketing problems include lack of sufficient quantities to attract buyers and lack of market information by crafts-persons. Technology constraints at the raw material level have been reported to be a lack of coordination between collection of balata and production. Financial constraints include the high cost of credit and difficulty on the part of producers to access credit for bulk buying of raw materials. Organizationally, the subsector is weak, business practices are poor, export planning is poor, and exporters lack sufficient scale to take advantage of export selling opportunities. Some more specific constraints include:

Weakness of balata producer group
Lack of coordinated marketing effort
Lack of methodology for handling of balata during production
Sporadic availability of raw materials

Insufficient new product development
Quality control irregularities
Lack of producer ability to sustain volume production

Potential Partners

Rupununi:

Conservation International (Georgetown)
CESO
Beacon Foundation
The Village of Nappi

General:

Handicrafts Associations
Export market intermediaries
International Buyers

2. Agro-processing in Berbice and Essequibo

Summary

The analysis of the subsector was undertaken in four parts, as follows:

- A review of the relevant literature from NGOs, Government, donor and academic sources.
- Meeting with those persons who have knowledge of the subsector, in Georgetown, Berbice, and Essequibo.
- Field investigations undertaken at farms and agro-processing firms.
- Workshops with subsector representatives which resulted in the validation of information collected from above activities, new information, and ideas for intervening in the subsector.

From the above, the consultant determined constraints and opportunities that are found in the subsector and considered support interventions to address them. The support intervention would include:

- The GEO together with partners (the GEO Team) will identify farmers, provide them with extension support to organize them into groups, and enhance their production and management abilities in providing raw materials to agro-processors.
- The GEO Team will support the development of the two women's agro-processing groups; in Berbice/Upper Corentyne the group supported by the St. Francis Xavier Youth Club, and in Essequibo the group that is being assisted by Ms. Gene Amsterdam and others. The groups will undertake the responsibilities of securing raw materials, coordinating production, and marketing.

- The GEO Team will identify market outlets for the products produced by the groups and assist in developing relationships with buyers.
- In partnering with the women's groups, the GEO Team will identify and work with agro-processors in groups to assist them in developing products of sufficient quality and quantity for reaching larger markets.
- The GEO Team will work to facilitate the process for farmers to access credit from financial institutions.
- The GEO Team will explore the possibility of introducing private sector agricultural extension service to these farmers.

Statement of Opportunities and Constraints

Fruit and vegetable production is an important part of the farming system in Guyana and provides both food security and income through the marketing of fresh and processed products. A large variety of agricultural crops are grown throughout the country. There are many organizations involved in furthering the development of agricultural production. Processing of these fruits and vegetables is being undertaken, albeit in a fragmented way. In spite of the fact that most of the processing is done at home or in a "cottage" type environment, there does seem to be a solid base of expertise in processing of fruits and vegetables throughout Guyana.

In spite of these opportunities there are constraints facing those in the subsector. Marketing problems include lack of sufficient quantities to attract buyers, poor presentation of products and lack of market information for MSEs. Technology constraints at the raw material level have been reported to be poor agronomic and post-harvest management on the part of the small-scale farmer, limited access to adapted seeds, limited extension backup and lack of processing technology.

Financial constraints include a high cost of credit and difficulty on the part of farmers and agro-processors to access credit. Organizationally, the industry is weak; business practices are poor, export planning is poor and exporters lack sufficient scale to take advantage of selling opportunities in Europe. Finally, on-farm infrastructure like irrigation, access roads and packing houses also represent potential obstacles.

Potential Partners

Essequibo:

Ms. Gene Amsterdam
CESO (Guyana Agro-processors Association)
IICA

Berbice/Upper Corentyne:

St. Francis Xavier Youth Club

General:

Guyana National Bureau of Standards
Partners for the Americas – Farmer to Farmer Program
Export market intermediaries

3. Leather products in Berbice and the Rupununi

Summary

This summary is the result of analyses and intervention design efforts for the “leather products” Subsector Berbice/Upper Corentyne and Rupununi regions of Guyana. The analysis included:

- A review of the relevant literature from NGOs, Government, donor and academic sources.
- Meeting with those persons who have knowledge of the subsector, in Georgetown, Berbice, and the Rupununi.
- Field investigations of tanning and production sites.
- Workshops with subsector representatives. This resulted in the validation of information collected from the above activities, new information, and ideas for interventions in the subsector.

From the above the consultant determined constraints and opportunity that exist in the subsector and considered support interventions to address them. In general, the support intervention activities chosen are:

- The GEO together with partners (the GEO Team) will identify producers and provide them with extension support to organize them into groups and enhance their production and management abilities.
- The GEO Team will support the development of two leather production groups; one in Berbice/Upper Corentyne, this group could be supported in partnership with the Chamber of Commerce and other identified individuals, and the other in the Rupununi where the GEO could be assisted by the Beacon Foundation and other partners. The groups, with their partners, will undertake the responsibilities of securing raw materials, coordinating production, and marketing of finished products.
- The GEO Team will identify market agents who will purchase the products produced by the groups, and assist in developing relationships between buyers and the production groups. Marketing agents are key in providing both forward and backward linkage services. The GEO team will build the capacity of these agents to better meet increased demand from international buyers and to translate that demand to producers, enabling them to meet buyer needs. Digital images displayed via the internet will enhance advertising efforts for the products.
- The GEO Team will identify and work with leather producer groups to assist them in developing products of sufficient quality and quantity for reaching larger (local and export) markets.
- The GEO Team will work to facilitate the process for these producers to access credit from financial institutions.
- The GEO Team will also work to develop the tanning activities of various skins used in the manufacturing of leather products.

Statement of Opportunities and Constraints

Leather products have long been manufactured in Guyana. There is a firm skill base of those who began with farming and other functional products. These include saddles, reins, bags, belts, etc. From this evolved the production of more artistic lines that include decorated belts and bags, wallets, objet d'art for walls, etc. Producers of leather products are scattered throughout Guyana supplying mainly local markets. In both regions there are excellent artisans capable of transferring their expertise to others. The skins used for the leather are tanned in the various production locations. This is done using two methods; 1) organically, using the bark of the Mari Mari and other trees, and 2) the method most often used throughout the world, using chemicals. Both methods seem to provide excellent treatment of the skins. Skins are indigenous and although their availability is currently at a low, this is expected to change in the near future, if and when Guyana is re-certified free of foot and mouth disease.

The subsector is not without constraints. Major problems relate to marketing, technology, finance, management, and organization. Marketing problems include lack of sufficient quantities to attract buyers, poor presentation of products and lack of market information for MSEs. Technology constraints at the raw material level have been reported to be a lack of coordination between tanning and production. Financial constraints include the high cost of credit and difficulty accessing it. Organizationally, the subsector is weak, business practices are poor, export planning is poor and exporters lack sufficient scale to take advantage of export selling opportunities. Some more specific constraints include:

Lack of a formal association of leather producers
Lack of coordinated marketing efforts or market intermediaries
Lack of required tools
Unavailability of skins for tanning
Insufficient new product development
Quality control irregularities
Lack of producers' ability to sustain volume production to meet buyers needs

Potential Partners

Rupununi:

Beacon Foundation
Cattle ranchers Association
Chamber of Commerce

Berbice/Upper Corentyne:

Chamber of Commerce

General:

Guyana National Bureau of Standards

Ministry of Fisheries, Crops and Livestock
Export market intermediaries

4. Nibbi furniture in Essequibo and the Pomeroon

Summary

The following is the result of analysis and intervention design efforts for the "Nibbi Furniture" subsector in Guyana, specifically Essequibo and the Pomeroon. The analysis is based on:

- A review of the relevant literature from NGOs, Government, Donor and Academic sources.
- Meeting with those persons who have knowledge of the subsector, in Georgetown and Essequibo.
- Field investigations at production sites.

If this subsector is selected for GEO assistance, suggested support initiative activities should include:

- The GEO together with partners will identify producers in both Essequibo and the Pomeroon, and provide them with extension support to organize them into groups, and provide technical assistance to enhance their production and management abilities.
- The GEO Team will support the development of the Nibbi furniture in a collaborative effort with other partners in the Essequibo and the Pomeroon. This effort will include the general areas of securing raw materials, coordinating production, and marketing.
- The GEO Team will identify export market agents who will purchase the products produced by the groups, and assist in developing relationships between buyers and production groups. These agents are key in providing both forward and backward linkages. The GEO team will build the capacity of these agents to better meet increased demand from international buyers and to translate this demand to producers.
- The GEO Team will identify, help establish (if necessary) and work with the Nibbi furniture producers' group to assist them in developing products of sufficient quality and quantity for reaching larger markets.
- The GEO Team will work to facilitate the process for these producers to access credit from financial institutions.

Statement of Opportunities and Constraints

Nibbi is a non-timber product of the palm family. It is a renewable resource that is similar to rattan. Nibbi has been used by the Amerindians of Guyana for furniture making for many years. The product is versatile, strong and particularly suitable for tropical climates. There are many who possess the skill for collecting the raw material and for producing the furniture. Nibbi products currently include indoor and outdoor home furniture, e.g. chairs, sofas, settees, coffee and end tables. There is also a range of office furniture. Additionally there are mirror frames, serving trays, multi-purpose containers, etc. These are all made with the Nibbi "cane" base, with some articles further decorated with weaving from fronds of the palm. The "cane" is heated so it can be molded into the required shape. Producers of Nibbi furniture are, for the most part Amerindian, although others are also producing. The raw materials used for the furniture are gathered from a variety of areas throughout Guyana. For our purposes we will concentrate on the regions of Essequibo and the Pomeroon. The furniture, for the most part, is handcrafted and of good quality. Designs range from basic cane type pieces to more garish heavily woven and highly decorated items.

Constraints include those related to marketing, technology, finance, organization and management. Marketing problems include lack of sufficient quantities to attract buyers, poor presentation of products and lack of market information for MSEs. Technology constraints at the raw material level have been reported to be a lack of coordination between collection of Nibbi and production. Financial constraints include a high cost of credit and difficulty on the part of producer to access credit. Organizationally, the subsector is weak, business practices are poor, export planning is poor and exporters lack sufficient scale to take advantage of export selling opportunities. Some more specific constraints include:

Lack of formalized grouping of Nibbi furniture producers
Lack of coordinated marketing effort
Lack of modern (non mechanized) tools
Insufficient finishing and treatment
Insufficient new product/design development
Quality control irregularities
Lack of producers' ability to sustain volume production

Potential Partners

Essequibo/the Pomeroon:

Mr. Rajpaul Singh
Ms. Gene Amsterdam
CESO (Guyana Agro-processors Association)
IICA

General:

Partners for the Americas – Farmer to Farmer Program
Export market intermediaries

VII. General Conclusions and Recommendations

The GEO is in a good position to provide support to the MSEs of Guyana. Interventions may be in the form of training, institutional capacity building, group formation, and in coordinating activities among the trade groups of the subsector. Support should focus on component parts of a larger program for each subsector. It will be necessary to initiate a strong, focused effort in developing an institutional base, and then provide for sustainability efforts over time. To do this, the GEO needs to have continuity in the provision of support to the MSE. The GEO could take on the role of coordinator or broker of development activities for all levels of assistance (raw materials, producer, producer groups, and marketing). If it does assume this role, GEO would need a full-time, local person who is able to actively coordinate the activities of GEO and partners in a well orchestrated effort toward developing the chosen subsectors. The main consideration is that GEO ensure a total package of assistance, and that the efforts do not become the provision of ad hoc technical assistance that is not linked to a wider program of directed intervention.

The following presents six major components of potential GEO programming from a general viewpoint that takes into account a total package of assistance to MSEs.

1. Marketing

There is a strong need for marketing assistance. GEO can coordinate and provide assistance in gaining access to markets. There is great potential for MSE products both within the country and as exports. Currently MSEs do not have access to markets due to lack of knowledge, real or perceived issues related to quality, lack of interest from those who could provide sub-contract work, lack of government commitment, etc.

A plans of action could include:

- Assist MSEs in identifying new product lines
- Provide linkages between larger industries and MSEs as feeders or subcontractor
- Assist in the development of a "quality control" body that will be able to help MSEs in competing with imported goods
- Aid in the promotion of exportations for products from Guyana's MSE sector (mainly, CARICOM, and then Brazil, N. America, and the EU).
- Organize buyer - sellers meetings
- Assist market intermediaries to enable them to better serve buyers and sellers.

2. Government Policy and Regulations

It has become clear that Guyana’s MSE sector cannot rely solely on market forces for its development and that policy intervention is needed. The sector is struggling and is in need of concerted efforts for its development

Government policy must be written to include statements and actions in support of the MSE sector, for example:

- The government is committed to the development of the MSE sector
- The government must ensure that MSEs can prosper in conditions that offer fair competition, to provide incentives for entry into the sector and to minimize bureaucratic red tape, including:
  General lessening of bureaucratic red tape
  Taxation (incentives and fair assessments)

Land (provision of adequate premises)
Access to markets (government and export)

- The government should seek to enhance the image and social attitudes toward the MSEs of Guyana.

A plan of action could include:

- Policy Formation for MSE Development - As there is presently a lack of policy for MSE development, it seems crucial that planning and implementation be developed as soon as possible. The policy must be one that provides for an enabling environment for MSEs and encourages entry into self-employment.

- Simplify Regulations and Bureaucracy - Time and again it was reported that the regulations and formalities that MSEs have to undergo are a deterrent to those who may wish to go into business and a hindrance to the smooth running of businesses. Entrepreneurs report countless forms to be completed and long waits for action. Many of those that do enter self-employment, do it on an informal basis to avoid obstacles caused by the bureaucracy.

3. Institutional Development

The MSE sector needs assistance and it appears that there are not adequate inputs from organizations mandated to address the needs. The aim will be to assist in the development of institutions that could be in a position to assist MSEs. These institutions could become an important component to Guyana's MSE program capable of influencing MSE development on a national scale. GEO could play a coordinating role and as a deliverer of direct assistance to institutions. GEO interventions could include:

- Support to new and existing institutions. There must be a total evaluation of institutions and their capabilities with an aim toward their development

- Establishment of a forum to develop and promote co-operation among those institutions involved in MSE development. It has become quite apparent that there are those interested and/or involved in MSE development that seem to be operating in individual environments. There is a need for interactions and co-operation among all those involved to enable better planned and implemented service to the end user, the MSE. GEO is in a good position to take the lead in establishing a forum for MSE development and coordinating the related efforts. Others interested in this concept are the NGO forum and the Guyana Small Business Association.

- Aid in the development of other MSE support institutions that can work in tandem with GEO to provide a comprehensive package of BDS that is needed by MSEs throughout the country. GEO can design and develop state of the art institutional management, training and extension methodology that could be disseminated to the appropriate institutions.

Potential partners would include NGOs, private firms, the regional chambers of commerce, etc.

- Direct Intervention

  - Develop, test and disseminate relevant entrepreneurship and business management training methodology for MSE entrepreneurs
  - Become more involved in marketing efforts for MSEs
  - Develop and implement a campaign for awareness and image enhancement of MSEs

4. Business Awareness/Business Image Improvement Programs

At this point in time MSEs are confronted with an "image" problem as viewed by society in general. For the most part MSEs are not encouraged and are not viewed as "serious" business. Additionally, there needs to be an effort to alleviate fears of those who are hesitant to enter into business due to their perceptions of high risk and problems.

The approach would include media campaigns, presentations, seminars etc. The aim would be to present self-employment as a viable alternative. Special groups would be targeted e.g. graduates, those made redundant by downsizing (e.g., Linden), those attending skills training courses, etc.

New Business Ideas

There is potential for the expansion of existing businesses through product diversification and also entry into new business types. Any new activity must be preceded by a thorough feasibility study to ensure the correct approach and allow for greater chances for success. This may be particularly relevant for proposed interventions for Linden.

The following is list of potential new products or marketing efforts. In the case of the products listed, virtually all are currently imported. It is essential that the local products be of sufficient quality to compete with the normally high level quality of imports.

METALWORK

Diversification of products for those involved in metal works to include:

- Metal furniture handles/ornaments
- Tableware; forks, knives, spoons
- Bolts and nails
- Metallic shelving

TEXTILES

As diversification to the production of clothing, the following are suggested:

- Textile upholstery of good quality (home/vehicle)
- Lampshades
- Computer systems covers
- Buttons and other ornamental accessories for readymade garments

FOOD

The main considerations here would, again, be the provision of international standards of quality.

- By products from coconut palms (used for oil)
- Fresh 100% juice (there is a wide variety of fruit being grown throughout Guyana)
- Fresh milk and cheese at the local level (fresh milk is extremely difficult to find, most milk consumption is that of imported UHT or powered milk)

CHEMICALS/PLASTICS

Related products are usually imported or provided by up and coming medium scale businesses, but could also provide possibilities for the MSE sector.

- Spares for vehicles; v-belts, hoses, bushings
- Eyeglass frames from plastic
- Synthetic soles for shoes

OTHER

These are, for the most part, currently being imported and are also viable possibilities for the MSE level enterprise.

- Packaging of all types (plastic containers, cardboard containers, etc.)
- Industrial clothing/uniforms
- Wood sporting goods; bats, cue sticks, etc
- Stationery; paper, pads, pencils, pens
- Wall clocks and other household decorations

5. Information Center

There is a lack of information available to MSEs in Guyana. There is much that the entrepreneur should be aware of but there are no solid conduits for the information related to assistance, market opportunities, regulations, new technology, etc.

Information centers could be established to meet this crucial need. A center would be a clearinghouse of written and electronic information and could provide signposting, that is it would be able to refer the entrepreneur to an agency, organization or person who does have the information. The most likely possibility would be to develop the Center from an existing organization, and in the future the Center could evolve into a self-sustaining independent body that can provide a wider range of services to MSEs. Two bodies have expressed an interest in this type of "Center", the NGO Forum and the Guyana Small Business Association.

6. Professional Business Services

Many MSEs are losing money as a result of their inability to manage certain aspects of the business such as clerical, bookkeeping, or legal issues. Paying a small amount to have books kept for the business could bring much more financial gain. MSEs and accountants (or other business professionals) should be brought together to explore the mutual benefit that a working association would bring. A business professional could start a service business that can cater to the not too complex needs of the MSE and charge a modest sum. As the MSE grows, so too will the business service.

APPENDICES

1. Selection Criteria
2. List of Contacts
3. Proposed Intervention for Policy

APPENDIX 1

Subsector Selection Criteria and Scoring

Rupununi

Criteria	wt	SS1	SS2	SS3	SS4	SS5	SS6	Comments
		Cashews	Peanuts	Livestock	Balata	Leather	Weaving	
Unmet Market demand		2	3	4	3	3	1	SS3 Foot/Mth disease
Export potential		4	4	1	3	3	2	
Potential for employment creation		3	3	2	3	2	2	
Value added/use of domestic inputs		4	5	4	5	3	5	
MSE highly represented		3	2	2	5	5	4	
Potential to reach more women		3	2	2	3	3	2	
Potential to reach Amerindians		3	3	3	5	3	5	
Linkage opportunities		3	4	4	3	3	2	SS1 – IICA doing pilot
Partnering (w/other orgs) opportunities		4	3	3	4	4	3	
Available Technology		3	3	3	5	5	5	
TOTALS		32	32	28	39	34	31	

Ranking from 1 – 5 with 1 indicating low and 5 high.

Essequibo

Criteria	wt	SS1	SS2	SS3	SS4	Comments
		Wood Furn	Ag. Process	Nibbi Furn	Palm	
Unmet Market demand		2	3	3	3	
Export potential		3	3	3	4	
Potential for employment creation		2	4	3	4	
Value added/use of domestic inputs		4	4	5	5	SS3/4 – with proper conservation
MSE highly represented		2	3	4	4	
Potential to reach more women		1	4	2	2	
Potential to reach Amerindians		2	3	4	5	
Linkage opportunities		2	3	4	4	
Partnering (w/other orgs) opportunities		2	4	3	4	
Available Technology		3	3	4	4	
TOTALS		23	34	35	39	SS4 – nationwide effort w/CESO

Ranking from 1 – 5 with 1 indicating low and 5 high.

Berbice/Upper Correntyne

Criteria	wt	SS1	SS2	SS3	SS4	SS5	Comments
		Leather	Textile Handi	Ag Proc	Wood Furn	Palm	
Unmet Market demand		3	2	3	2	3	SS2 and SS4 – market potential unclear
Export potential		3	2	2	2	3	All have export market potent.
Potential for employment creation		3	3	3	2	3	
Value added/use of domestic inputs		4	2	3	4	4	All use domestic raw materials
MSE highly represented		4	4	4	3	4	
Potential to reach more women		2	4	4	2	2	
Potential to reach Amerindians		2	2	3	1	3	
Linkage opportunities		3	2	3	2	4	SS5- links with oil factories
Partnering (w/other orgs) opportunities		3	3	3	2	4	SS5 – CESO/GVC
Available Technology		4	4	3	2	2	SS4 – needs tech. upgrade
TOTALS		31	28	32	22	32	

Ranking from 1 – 5 with 1 indicating low and 5 high.

APPENDIX 3

List of Persons Contacted

Name	Organization	Contact Information
GEORGETOWN		
Dr. Leslie Chin	CESO/GVC	02 60203
Mr. Jerry La Gra	IICA	02 68835
Ms. Manjula Brijimohan	IPED	02 38370
Mr. Danny Wallace	USAID	02 57318/9
Dr. Carol Becker	USAID	02 57318/9
Mr. Thomas R. Whitney	GEO	02 37144
Ms. Tulsi Azore	GEO	02 37144
Mr. Gordon Studebaker	GEO	02 37144
Mr. Ivor Marslow	APA	02 70275
Mr. Patrick Zephyr	GSBA	02 51192
Mr. David Cassells	Iwokrama	02 51504
Ms. Jocelyn Dow	Red Thread	02 74376
Ms. Peal	Red Thread	02 74376
Mr. Mervyn St. Hill	Perm Sec. Ministry of Agriculture	02 61003
Mr. Nigel Durant	Ministry of Agriculture	02 61003
Ms. Elizabeth Cox	Ministry of Agriculture	02 61003
Ms. France Asselin	Canadian High Commission	
Mr. David Yann	NGO Forum	02 73551
Ms. Yvette Bailey	NGO Forum	02 73551
Ms. Daphne Rogers	Guyana Women’s Handicraft Association	
Mr. David Yankana	PSC	
Min. Vibert De Sousa	Ministry of Amerindian Affairs	02 75067
Ms. Maria Ralha	EU	02 64004
Mr. Deochand Narine	GOINVEST	02 50653
Ms. Sattie Sawh	Export Promotion Council	02 56313
Mr. Compton Roy Chin	Chin’s Manufacturing	020 2818
Mr. Jeffery Wilson	Chin’s Manufacturing	020 2818
Mr. Rudy King	Amalgamated Exporters	305 233-5726 (USA)
Mr. Andrew Hall	DFID – Caribbean	246 4307978 (Barbados)
Ms. Kate English	DFID – Caribbean	246 4307955 (Barbados)
Mr. Clement Duncan	Swansea Industrial Associates	02 58845
Mr. Ben Carter	Partners of the Americas	02 43751
Ms. Natasha Floy	Farmer to Farmer Program	02 69074
Mr. Nizam Hassan	NGMC	02 78801
Mr. Andrew Mendez	Farfan and Mendez Ltd.	02 66401

Mr. Charles Carmichael	IICA	02 68835
Mr. Cromwell Crawford	IICA	02 68835
Min. Satyadrow Sawh	Ministry of Fisheries, Crops and Livestock	02 56768
Ms. Sarah Barlow	DFID	
Mr. Neville Waldron	Conservation International	02 67399
Ms. Natasha Lloyd	Conservational International	02 67399
Mr. Faud Mohammed	Exporter	022 3606
Mr. Claudius Wickham	CARDI	022 4430
Mr. Jack Dummett	Entrepreneur	c/o Red Thread
Mr. Alex Foster	RWCDG	037 4090
Mr. Fletcher	Juce-up Manufacturing	020 2818
Mr. C. Bisheswar	Bisheswar and Co.	02 62078
Dr. R. S. Surujbally	Ministry of Fisheries, Crops and Livestock	02 68568

RUPUNUNI		
Ms. Sharla Hernandez	Rurununi Weavers Society	072 2092
Mr. Claremont Lye	Beacon Foundation	02 62533 (G’town)
Ms. Shirley Melville	Entrepreneur	072 2085
Mr. Mohammed Khan	Pres. Chamber of Commerce/ Entrepreneur	072 2035
Mr. George Tancredo	Balata Crafts Producer	Nappi Village
Mr. William Toney	Peanut Farmer	072 2050
Mr. Grummond	Peanut Framer	c/o Chamber of Commerce
Ms. Elaine Foo	Entrepreneur – Agri. Proc.	“
Mr. D’agu	Cattle Rancher	“
Mr. Louis Orelle	Farmer	“
Mr. Oscar Dokie	Entrepreneur	“
Ms. Diane Turk	Cattle Rancher	“
Ms. Sandy DeFreitas	Cattle Rancher/Tourism	“
Mr. Andrew Demetro	Captain Nappi Village	“
Mr. Chalo Melville	Leather Products Producer	“
Mr. David King	Entrepreneur/ Chamber Official	“

LINDEN		
Mr. James H. Parks	Chamber of Commerce	04 6494
Mr. Steven Bovell	President, Chamber of Commerce	04 6091
Mr. Cyrus Nicholson	Entrepreneur	c/o Star Bonnet Hotel
Ms. Lorrain Duke	Entrepreneur	04 2401
Mr. Keith Sandiford	Entrepreneur	04 3918
Mr. Tony Daly	Entrepreneur	04 4030
Mr. Robert Johnson	Entrepreneur	04 3143
Ms. Yonnette Kingston	Entrepreneur	
Mr. T. W. Simmons	Chamber of Commerce	04 6374
Mr. L. Belgard	Entrepreneur	04 4115
Mr. John Ceasar	Entrepreneur	04 4086
Ms. Coretta Brathwaite	Entrepreneur	04 3610
Mr. Carl Themas	Entrepreneur	04 3185
Mr. Dallom Jacobs	Entrepreneur	04 4196

BERBICE/CORENTYNE		
Mr. Mohammed Rafik	Chamber of Commerce	
Mr. Ramdial Bhookmohan	Chamber of Commerce	03 3927
Ms. Katija Rambarran	Development Worker	03 4014
Mr. Mukesh rambrich	Woodworker	03 4116
Mr. Elvis Victor	Wood Sculpturer	03 2021
Mr. Eion Reynolds	Leather Products Producer	03 5563
Ms. Hazel White	Knitter	03 3510
Ms. Fadia Mohammed	Cross Stitcher	03 5565
Ms. Cicely Pollard	Knitter/Sewer	Countland Village, Corentyne
Ms. Vanetta Shepard	“	“
Ms. Carmeala Motiram	Handicraft Producer	#2 Village, E. Canjie
Ms. Paeshanie Bhookmohan	Entrepreneur	03 3927
Ms. Selena Ramsarran	Handicrafts Producer	Fryish Village
Ms. KamalRamautar	Handicrafts Producer	037 4242 (Corentyne)
Ms. Denise Sultan	Fruit/Veg Grower	03 3881
Mr. Bhupaul Jhagroo	Fruit/Veg Supplier	Mara, East bank
Ms. Abigale Riddle	Agri. Processor	Glasgow Village
Ms. Latisha James	“	Brothers Village, E. Bank
Ms. Hyacinthe Stewart	“	Hogstye Farm, Corentyne

ESSEQUIBO		
Mr. Khalid Hassan	Educator	071 4808
Ms. Gene Amsterdam	Educator/Development Worker	c/o Chamber of Commerce
Mr. Nizam Barakat	Timber Business	“
Mr. Adrian Stuart	Bank Manager	NBIC – Anna Regina
Mr. Matadeen Etwardoo	Fish exporter	c/o Chamber of Commerce
Mr. Jalill Khan	Furniture Manufacturer	071 4309
Mr. Basil Persaud	Insurance Business	c/o Chamber of Commerce
Mr. R. Bacchus	Entrepreneur	“
Mr. Kishlore Jai Gobin	“	“
Mr. Mohammed Nazmul	Wildlife Exporter	c/o Chamber of Commerce
Mr. Nateram Ramnanan	Original Juice Man	071 4093 Charity
Mr. Mohammed Rafik	Juce-up	Anna regina
Mr. Steve Hemraj	President Chamber of Commerce	071 4699
Mr. Rajpaul Singh	Nibbi Furniture Manufacturer	074 4497

APPENDIX 4

Policy Intervention Concept Paper

Proposed Intervention for Policy Issues

In going through the process of determining constraints and opportunities for the subsectors studied, it became clear that there were policy issues that cut across subsectors. In general, it appears that there is no government policy aimed at providing an enabling environment for MSEs.

Some policy issues relate to all subsectors, while others affect most subsectors. The following presents a general list of policy related constraints that were identified during the various stages of information gathering (interviews, focus group discussions, subsector workshop, further analysis and information gathering).:

UTILITIES

- Utility rates are not favorable to MSEs
- Transport off main coastal roads is difficult to nearly impossible
- Blackouts and load shedding of electricity are a problem
- Waiting time for telephone service is viewed as excessive

TAX/DUTY

- Consumption tax is viewed as extreme at the MSE level
- Income tax reform needed for MSEs
- Exporting and export tax procedures are reported to be problematic and could be simplified for MSEs
- Impending effect of WTO regulations on imports of competing finished goods will have an impact on MSEs

LAW AND ORDER

- Bureaucratic red tape and corruption
- Livestock rustling in the Rupununi

OTHER

- Lack of overall policy for MSE in Guyana
- Lack of access to credit from the commercial banking sector
- In general, lack of support from the Ministry of Industries for MSE producers
- Government should further promote local trade, tourism and international buying of Guyana products.